How to add and complete a WO subject to budget approval?

help.fracttal.com/hc/en-us/articles/25021172151053-How-to-add-and-complete-a-WO-subject-to-budget-approval

A WO subject to budget approval cannot be edited until a budget has been added and approved. To add a budget to a order, click on the budget symbol that appears on the WO (only appears on WOs that have been created with this option).

Work Management			🗶 🔳 💽 ~
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Pending Tasks 178 🖒	WOs in Process 2763) WOs in Review 219 5	Closed WOs
0	WO-1018INAC Created by Jonas Campos	WO-1008INAC Created by JOSÉ FERNANDO CRUZ MOSQUEDA	WO-1015INAC Created by Ramon Toro
Asset: INACAP { INAC-001a }	Asset: FRUNIV { MON-FA-0001 } MONTADORA - FA 22222.0111.07	Asset: Baño de Caballeros de Albercas { Baño de Caballeros de Albercas }	Asset: { BANDA-2 } BAND.
Task: RAMPLA AUDITORIO =	Task: Revisión de Equipo =	Task: Fuga de agua en Baño de Caballeros - cambi 😞	Task: Falla
120:00 2025-04-08	 Ŏ 00:10	⑦ 02:00	 00:10 = 2025-04-07
🗟 UNPLANNED 🏷 📋	🕑 Jonas Campos 🕑 ፤	🕑 EMILIO BOSQUES 🕑 🗄	💠 Abelardo Perez
0	WO-1017INAC History Created by JOSÉ FERNANDO CRUZ MO Budgets	OT-76-GR Created by Alexander Fuentes	WO-1012INAC Created by Imène Chakroun
Asset: Cuarto de Caldera #1 { Cuarto de Caldera #1 }	Asset: CLERIS { SAT-M-TRAC.A-002 VV9101050MB286048	Asset: { SAI-01 } SAI 01	Assets Wor
Task: Mantenimiento de instalación sanitaria	Task: SOLICITUD PASA A OT	Task: Correctivo por alta temperatura =	Multiple assets
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EVERY 6 MONTHS	Adrian 🕁 :	Adrian 🕁 :	A Adrian
0	WO-1016INAC Created by Alexander Fuentes	OT-68-GR Created by DIEGO VERGARA	WO-1007INAC Created by EMILIO BOSQUES
Asset: Cuarto de Caldera #1 { Cuarto de Caldera #1 }	Asset: Obra 01 { OBRA-01 }	Asset: { EQ.ECV-00 } GENERADOR	Asset: Cuarto de Caldera #
Task: Mantenimiento de impermeabilización	Task: Preventivo mensual-Obra 01 =	Task: INSPECCION SEMANAL =	Task: Mantenimiento cuar
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Then, by clicking on it, a new window will appear where the different budgets associated to the WO execution must be added.

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			WO-1017INAC			OT-76-GR				
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Та	sk: Mantenimiento de instalación sanitaria	~	Task: SOLICITUD PASA A OT			Task: Correcti				
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Work Management View Kanban						- Budget description
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Work Management View Kanban				Budget description		6
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Finally, once the budgets have been added, all that is required is approval, which can be done directly from the WOs or Budgets module.

Budget Approval from the Work Order

In the selected work order, choose the budget option. A sidebar will appear showing the assigned budget and the option to proceed with the approval.



Budget Approval Directly from the Budget View

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Task: Preventivo mensual-Obra 01

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Asset: Cuarto de Caldera # 1 { Cuarto de Caldera # 1 }

Task: Mantenimiento de impermeabilización

From the main menu, go to the "Work Management" module and then "Budgets". Locate the appropriate budget in the list and click on the icon to proceed with the approval.

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Asset: { EQ.EC

Task: INSPEC

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Start			WO-1018INAC Created by Jonas Campos		WO-1008INAC Created by JOSÉ FERNANDO CRUZ MOSQUEDA		WO-1015INAC Created by Ramon Toro
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Opling help	Ŷ	<i>#</i> 1)	Asset: Obra 01 { OBRA-01 }		Asset: { EQ.ECV-00 } GENERADOR		Asset: Cuarto de Caldera #
Support	Create ticket		Task: Preventivo mensual-Obra 01	= 0 %	Task: INSPECCION SEMANAL	= 0%	Task: Mantenimiento cuar
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Work Management Budgets

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0	Work Order	Asset	Third Party	Sequence	Cost center
	WO-1018INAC	FRUNIV { MON-FA-0001 } MONTADORA - FA 22222	Fracttal	247	
	OT-44-GR	H0Y0 18 { GRU-AV-G03-CG1-HY18 }	MULTISERVICIOS OUTSORCING LTDA	245	00-Fracttal Mex
	OT-39-GR	{ EQ.ECV-00 } GENERADOR	SAVIA	246	0800TDA127
	OT-2456	003 CH PLAN DE SAN LUIS { T-3 }	MASER	244	0800TDA102
	0T-2417-IMP	{} Anestesia 1	Fracttal México SA de CV	243	00-Fracttal Mex
	OT-2371-FRA	EQUIPO SUCKER	CDE	242	0800TDA122
	OT-2319-FRA	{ JD147 } JD147 JOHN DEERE 5076 EF	RODANDO SERVICES	241	1238
	OT-2282-FRA	{ HOR-01 } HORNO 01 H1000	AIR JBM COMPRESORES	240	10010000
	OT-2253FRA	{ 10009083 } GRUPO ELECTROGENO	MULTISERVICIOS OUTSORCING LTDA	239	14010000
	OT-2224FRA	COMPRESOR RECIPROCANTE 02 { COMP-02 }	AIR JBM COMPRESORES	238	10010000
	0T-2177FRA	HORNO 01 INOXIDABLE { HOR-01 } H1000	MADRILEÑA DE AIRE COMPRIMIDO	237	10010000
	OT-2004FRA	CHILLER 002 fracttal 25 { CHILL.000002 }	SAROB	234	100
	OT-145-NRM	{ ativo A } Ativo A	AIR JBM COMPRESORES	233	
	OT-134-NRM	{ HORN-003 } HORNO 3	MTM	232	3000
Showing 50 of 199					•

Then, when approving the budget (by any of the options), the user who made the approval will be indicated, together with a comment.

Finally, the WO will be enabled for editing and execution.



Note: When a budget is approved, it will not automatically be reflected in the resources added to the WO.